Resources for Tax Professionals

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A Virtual Small Business Tax Workshop DVD

A Virtual Small Business Tax Workshop DVD is an innovative DVD designed to help new and existing small business owners understand and meet their federal tax obligations. The workshop provides information and resources in an interactive format. The workshop consists of ten lessons and is subtitled in English, Spanish and Mandarin Chinese. The DVD running time is 3 hours and 43 minutes. If you would like multiple copies to distribute to your clients, contact your local Stakeholder Liaison.

Small Business Resource Guide CD

The Small Business Resource Guide (SBRG) CD-ROM is a handy, interactive CD designed to help the small business owners comply with the tax laws that are regulated by the Internal Revenue Service. The SBRG CD covers a broad range of topics from business start-up to closing a business. The CD includes business tax forms, instructions and publications along with all of the tax law changes for 2008. In addition to providing a wealth of tax-related information, the CD contains a wide variety of web links to various government agencies, business associations and IRS organizations. You can order copies of this CD at irs.gov. Type "SBRG" in the search box and follow the links to the ordering page. This product can also be viewed on-line through irs.gov.

Tax Calendar is Available for Small Business Taxpayers

The Tax Calendar for Small Businesses and Self-Employed is a 12-month wall calendar filled with information on general business taxes, IRS and SSA customer assistance, electronic filing and paying options, retirement plans, business publications and forms, and common tax filing dates. Each page highlights different tax issues and tips that may be relevant to small-business owners, with room on each month to add notes, state tax dates or business appointments.

The highly demanded tax calendar is widely used throughout the small business community. It provides the small business owner with a ready resource for meeting their tax obligations. For an online version of the calendar, visit the SB/SE pages on IRS.gov. Copies of the tax calendar can also be ordered online or by calling (800) 829-3676.

Issue Management Resolution System (IMRS)

The IRS Stakeholder Liaison's Issue Management Resolution System is designed to help tax customers communicate their issues directly with the IRS. IMRS provides a gateway for tax professionals to bring forward information about tax policies, practices and procedures that may negatively impact compliance and quality customer service for the American public. Contact your local Stakeholder Liaison to submit an issue.

Tax Talk Today

Tax Talk Today is a live Internet program featuring tax practitioners and top representatives from the IRS. Each program features lively discussions and real time interactions and the opportunity for viewers to participate in the discussion by e-mailing questions directly to our studio. In addition to the live web cast, the FREE monthly programs are available for up to 12 months as reruns through our archives or on an audio CD, VHS videotape or through a pod cast. Programs are accessed through www.TaxTalkToday.tv.

Electronic Newsletters

The IRS offers a variety of electronic newsletters. The most popular newsletter for practitioners is "e-News for Tax Professionals." The most recent addition to our electronic newsletters is "e-News for Small Businesses." In addition, specialty newsletters are available for exempt organizations, employee plans and retirement news. You can sign up for IRS electronic newsletter by going to "irs.gov" and selecting "Tax Professionals" and then "Subscription Services."

IRS Phone Forums

Phone forums are held on a regular basis on a variety of topics. At a designated time, you call a toll-free number and listen to a presentation followed by a question and answer session. Phone forums are free and can be done from the convenience of your office. CPE credits are available for enrolled agents. Topics in the past have included: The Energy Credit, Power of Attorney, Offer-In Compromise, Foreign Workers, and e-Services. Advanced registration is required through AT&T. To learn about upcoming phone forums click on "Tax Professionals" at irs.gov, then select "Tax Pro Events" and then "Practitioner Liaison Meetings, Phone Forums and Seminars". By selecting "Nationwide" you will see phone forums being held on a national level. If you select a specific state, you can identify local phone forums.

SSA / IRS Reporter

The SSA/IRS Reporter is a collaborative effort between the Social Security Administration and the IRS. It primarily communicates messages to employers that support employment and business tax compliance, with an emphasis on educating and encouraging electronic filing. The Reporter also carries general information about best payroll and employment tax practices and IRS and SSA products and services. The SSA/IRS Reporter is an effective source of information for small businesses and practitioners to learn about new or changing products and services. You view the publication electronically by going to irs.gov and typing "SSA/IRS Reporter" into the search box in the upper right-hand corner.

Practitioner Priority Service

Practitioner Priority Service (PPS) is a nationwide toll-free accounts service designed specifically for practitioners. PPS should be the first point of contact for account-related issues. PPS offers consistent service to all practitioners nationwide. Hours of operation are 8:00 AM - 8:00 PM local time. The toll-free number is 1-866-860-4259.

e-Services

The IRS has launched a suite of Internet-based business tools that give tax professionals quicker access to tax information. Through e-services you can:

- Pull up IRS transcripts on your clients in real-time
- Submit POAs to the IRS electronically
- Obtain W-2s and 1099s on-line
- Correspond with the IRS electronically

If you are an enrolled agent, CPA or attorney and you e-filed at least five returns this filing season, you have instant access to IRS products through e-Services. e-Services are available 24/7 from your computer.

Learn more about e-Services by contacting your local Stakeholder Liaison or by taking the on-line tutorials at irs.gov. Type "e-Services" in the search box to bring up the information on this new on-line tool.

Electronic Federal Tax Payment System (EFTPS)

A Secure Way to Pay All Your Federal Taxes

EFTPS is a tax payment system provided free by the U.S. Department of Treasury. Pay federal taxes electronically - on-line or by phone 24/7. Businesses and individuals can pay all their federal taxes using EFTPS. Individuals can pay their quarterly 1040ES estimated taxes electronically using EFTPS, and they can make payments weekly, monthly, or quarterly as well as schedule payments for the entire year in advance. As a practitioner, you can schedule these payments for your clients or you can encourage them to sign up for EFTPS and handle their own payments. For more information go to www.eftps.gov.

Irs.gov Tax Professionals

With IRS.gov, you can accomplish many things electronically through one single source. The Electronic IRS is a gateway to the many IRS electronic options that are available. IRS.gov has a special section devoted to information and resources for tax professionals. You can set up online payment agreements, use e-Services to get a transcript, access reference materials, get information on e-filing and locate materials on a plethora of issues. You can also refer your clients to IRS.gov to do such things as monitor their refund or request an EIN.

Spanish Products

Tax information can be difficult to understand in any language; but it can be even more difficult if it is not in your first language. To assist Spanish speakers, the IRS provides a wide range of free products and services. IRS.gov is available in Spanish. Just click on "ESPANOL" in the upper right-hand corner of irs.gov. Toll-free telephone assistance is available in Spanish on pre-recorded hotlines and from bilingual IRS representatives. In addition, many documents and publications are now in Spanish.

Tax Gap Fact Sheets

The Internal Revenue Service developed the concept of the tax gap as a way to gauge taxpayers' compliance with their federal tax obligations. The tax gap measures the extent to which taxpayers do not file their tax returns and pay the correct tax on time. The tax gap does not arise solely from tax evasion or cheating. It includes a significant amount of noncompliance due to tax law complexity that results in errors of ignorance, confusion and carelessness. In response to the need to provide clear explanations of tax issues relating to the tax gap, the IRS has developed a monthly series of fact sheets. Each fact sheet provides information on a topic that may cause confusion to taxpayers. Practitioners can use these fact sheets to help educate their clients. They may be used in newsletters, on websites, as a handout to clients or in conversations with clients to help explain a tax issue. The fact sheets, along with additional information on the tax gap, are available at IRS.gov. Type "Tax Gap Fact Sheets" into the search box at IRS.gov. The fact sheets are also available in Spanish.

Taxpayer Advocate Service (TAS)

The Taxpayer Advocate Service (TAS) is an independent organization within the IRS. If a taxpayer has tried to resolve a tax problem with the IRS and is still experiencing delays or is facing economic harm, assistance may be requested from the Taxpayer Advocate Service. Practitioners with a POA can contact TAS on behalf of their clients. Call the toll-free case intake line at 1-877-777-4778 or the Wisconsin TAS office at 414-231-2390.

Stakeholder Liaison

Stakeholder Liaison works with the IRS's stakeholders and as practitioners, you are our primary stakeholder. Our role is one of outreach and education. Our goal is to provide information about IRS policies, practices and procedures to ensure compliance with the tax laws. Although we do not deal with tax law questions or individual taxpayer problems, we encourage you to contact us about issues that negatively impact compliance and are burdensome for you and your clients. Please contact us whenever you think we might be able to assist you.

Audit Technique Guides (ATGs)

The Audit Techniques Guides (ATGs) were designed to assist in training Revenue Agents to better understand specific tax issues and industries, but may be useful as well to the business and practitioner communities in ensuring their tax returns are prepared correctly. The Guides contain common and unique industry issues, business practices, industry terminology and other information. There are currently 41 guides covering a wide range of topics and industries. Examples are: Laundromats, The Retail Industry, Golden Parachutes, and The Auto Body and Repair Industry. ATGs can be found at irs.gov. Enter "ATG" in the keyword/search box in the right-hand corner.